

# State of Michigan

## Records Center Operations Manual

### Records Transmittal and Retrieval Procedures

**Date Revised: 6/14/05**



Trainee Name	
Department	
Department Code	
Citrix Access	
Versatile Access	
Domain	

## Records Center Operations Training

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## INTRODUCTION

Both the Records Management Services (which operates the State Records Center) and the State Archives of Michigan are agencies of the Michigan Historical Center within the Department of History, Arts and Libraries (HAL). Together, these agencies ensure that Michigan government records are managed and preserved in a manner that promotes the effective and efficient operation of government activities, and that protects Michigan's documentary heritage. HAL uses software called Versatile Enterprise to facilitate the management of state government records.

This manual will teach you how to:

- Transfer containers to both the State Records Center and the State Archives of Michigan.
- How to directly input information into Versatile Enterprise.
- Retrieve containers and files stored at the State Records Center.

If you have any questions about the services provided by our agencies, please visit our website (<http://www.michigan.gov/recordsmanagement/>), or contact your agency's Records Management Officer.

## DEFINITIONS

### **1. Retention and Disposal Schedules (Agency Specific):**

Retention and Disposal Schedules are legal documents (required by statute) that list all of the records created and maintained by an agency. Schedules provide the legal authority to dispose of state records. Schedules are approved by the agency, the Records Management Services, the Auditor General, the Attorney General, the Michigan Historical Center, and the State Administrative Board. Schedules indicate if records are authorized for temporary storage at the State Records Center, and if they are supposed to be transferred to the State Archives for permanent preservation. Each department's Records Management Officer maintains a master set of Retention and Disposal Schedules. Copies of schedules may also be obtained from the Records Management Services.

### **2. General Retention Schedules:**

General Schedules are legal documents that list categories of records that are common to most offices in state government, such as general correspondence, meeting minutes, payment documentation, etc. General Schedules are reviewed and approved the same way as agency-specific schedules. Currently, there are General Schedules approved for: Administrative Records (#5), Accounting Records (#6), and Human Resource Records (#7). General Schedule #1 covers Non-Records (those materials that can be destroyed when they have no further value to the agency.) General Schedules may be obtained from the Records Management Services' website (<http://www.michigan.gov/recordsmanagement/>) or from your Records Management Officer.

### **3. Records Series:**

A records series is a group of records created to support a single business function. Individual records (such as the minutes of the January 2003 meeting of the Michigan Historical Commission) are filed and maintained as part of an organized records series (such as all meeting materials (minutes, agendas and supporting documentation) of the Michigan Historical Commission). Retention schedules (both specific and general) primarily list records series. Each records series listed on a retention schedule is assigned a number and a retention period.

### **4. Versatile Enterprise**

Versatile is computer software produced by a company called Zasio that is used by the State of Michigan to support various records management, storage and preservation activities. Versatile has been used by the Records Management Services, including the

State Records Center, since 1997; and it has been used by the State Archives of Michigan since 2000. Versatile is accessible through a web interface using Citrix software.

## **5. State Records Center**

The State Records Center is operated by the Records Management Services. The facility is located at 3405 N. Martin Luther King Jr. Blvd., in Lansing. The building was constructed in 1954 to house inactive records created by the State of Michigan. Records stored in the center remain in the legal custody of the creating agency that transferred them for storage. They can only be accessed by that agency or persons they designate.

## **6. State Archives of Michigan**

The State Archives of Michigan permanently preserves and provides access to Michigan government records with historical value. The State Archives is located at 702 W. Kalamazoo in downtown Lansing. The State Archives' facility was built in 1989, and it was designed specifically to ensure the protection and preservation of records with historical value. State agencies may transfer records to the State Archives in one of two ways: direct transmittal (the procedures in this manual); or Records Center transmittal (transfer of containers from the Records Center after their active retention expires). Records transferred to the State Archives become the legal property of the Department of History, Arts and Libraries, and cannot be physically returned to the creating agency. However, they remain accessible by contacting our Reference Services staff at (517) 373-1408, or via e-mail at [archives@michigan.gov](mailto:archives@michigan.gov). Additional information about the State Archives is available online at <http://www.michigan.gov/statearchives/>.

## **7. Records Management Officer (RMO)**

Records Management Officers serve as a liaison between state agencies and the Records Management Services. Each department has a designated RMO. If you want to know who is the RMO for your agency, an up-to-date list of the RMOs is available online at <http://www.michigan.gov/recordsmanagement/>.

## **PACKING CONTAINERS PRIOR TO TRANSFER**

Both the State Records Center and the State Archives of Michigan require that a particular type of box be used for transferring records. These boxes are designed to fit the shelving units that are used. Boxes can be ordered through the state-contracted office products vendor, Boise Cascade.

### **Commodity Numbers and Box Dimensions**

- Standard Boxes (used for letter and legal-sized files, binders, etc.): #5830-7040 (15" x 12" x 9.75")
- Shoe Boxes (used for photographic negatives and microfilm): #5830-4174 (14.75" x 9.5" x 4.5")
- Long Boxes (used for rolled items): #5830-2520 (26" x 12" x 9.75")

Records should be packed into boxes in the same order that was used in the agency's filing system. Letter-sized files should face toward the front of the box, where the label will be affixed. Legal-sized files should face toward the side of the box that is to the left of the label. Please leave one inch of clearance in the box to facilitate reference of items in the box. If the agency anticipates that additional files will be interfiled into the box at a later date, please leave additional space. Bar code labels will be sent to the agency prior to shipping the boxes, please place the label in the designated space on the box.

Do **not** put records with different disposal dates in the same box, and do **not** place records from different records series in the same box. Versatile can only assign one record series and one disposal date on each box.

### **Sealing the Containers**

Boxes should be sealed according to following instructions to facilitate their placement and removal from the shelving units:

- Fold in the end flap that is at the far end of the box, opposite from the label.
- Fold in the 2 side flaps so that they lie over the end flap that was just folded in.
- Fold over the remaining end flap that is at the label end of the box, so that it lies on top of the 2 side flaps that were folded in.
- Place a strip of craft or 2-inch wide masking tape across the last end flap that was just folded over, to secure the flap down tightly. Tape should extend fully across the flap, and approximately half way down the sides of the boxes, securely holding the box shut.

## SUBMITTING BOXES

Information about the contents of each box that is sent to the State Records Center and the State Archives of Michigan must be entered into Versatile prior to shipping the boxes. The information that is entered into Versatile is used to create barcode labels that are placed on each container. The Records Management Services will print and send the barcode labels to the agency.

Most state employees can receive Versatile user accounts so they can directly input information about their containers. However, employees who cannot access the State of Michigan's intranet are allowed to submit transmittal forms. Under these circumstances, HAL staff will enter the information from these forms into Versatile. If you believe that you are eligible to submit a transmittal form, please contact Jackie Mitchell at 517-335-9132 for confirmation. The transmittal form can be completed online at <http://www.michigan.gov/recordsmanagement/>.

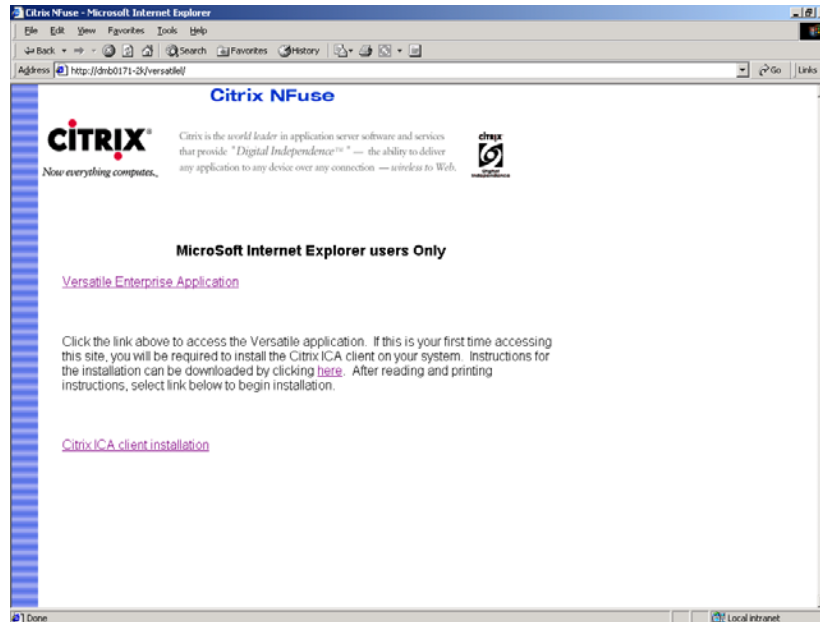
Employees with Versatile user accounts should follow the instructions in this manual for submitting boxes.

## LOADING CITRIX

The Versatile Enterprise software is accessed through a State of Michigan intranet server using Microsoft Internet Explorer. Citrix software must be loaded on your computer prior to accessing Versatile. If you have trouble loading Citrix, please contact the Department of Information Technology, Client Service Center at (517) 241-9700.

Please follow the steps below to load Citrix. **Note: Close all programs running on your computer before starting.**

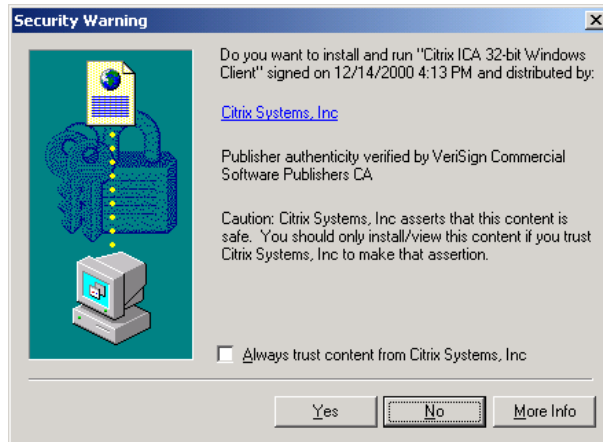
1. Open Internet Explorer.
2. Enter the following address,  
<http://intranet.dmb.state.mi.us/dmb/mgmt/services/oss/rfmd/versatile/>



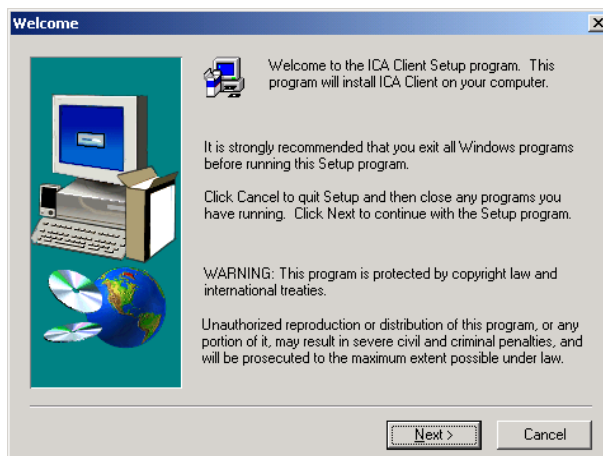
3. Click on the link "Citrix ICA client installation".



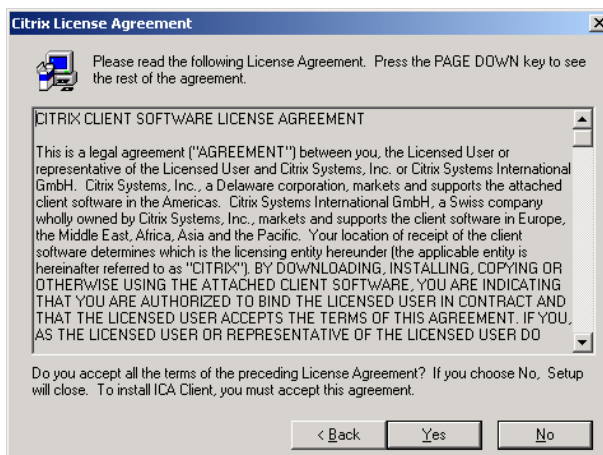
4. A security warning screen will open. Click the Yes button to begin installation.



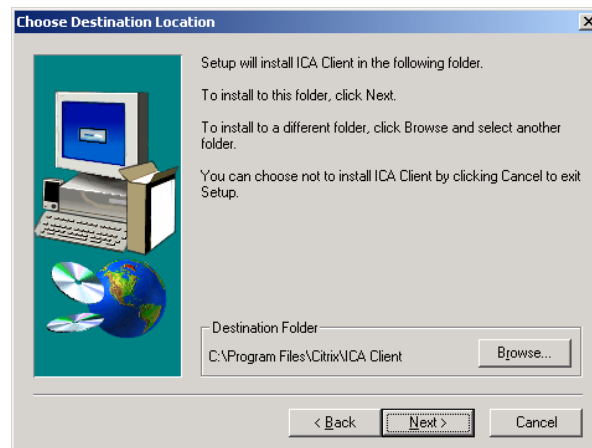
5. Click Next to continue the installation.



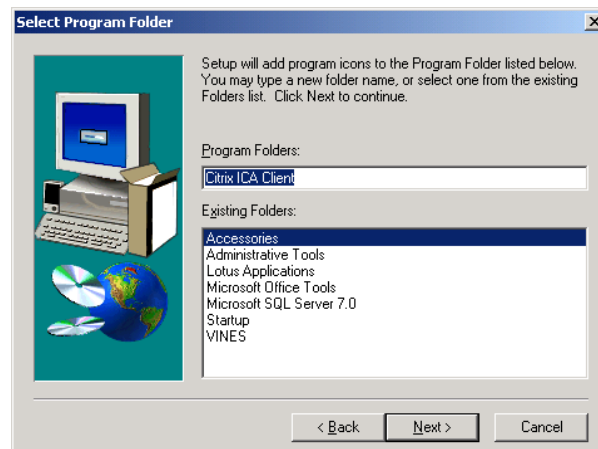
6. Click the Yes button to accept the License Agreement.



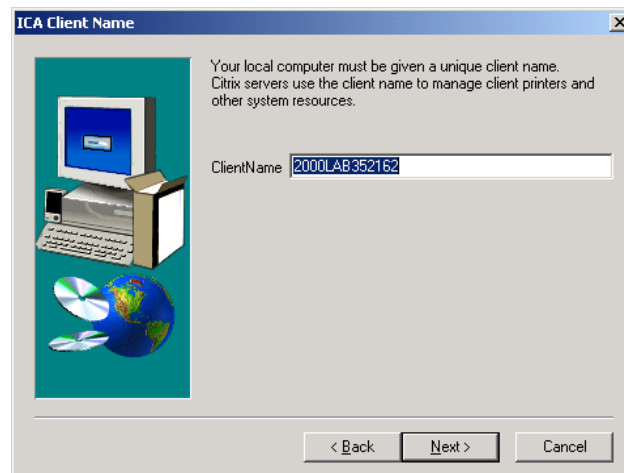
7. Click Next to accept the default location.



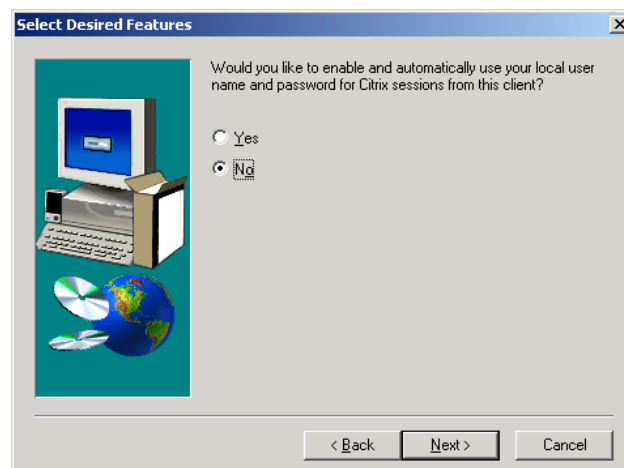
8. Select Next to accept default Program Folder.



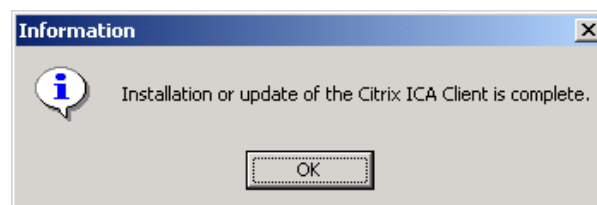
9. Click Next to accept the ClientName.



10. Click Next to accept the default.



11. Click OK on the information screen. You may need to close Windows Explorer first.

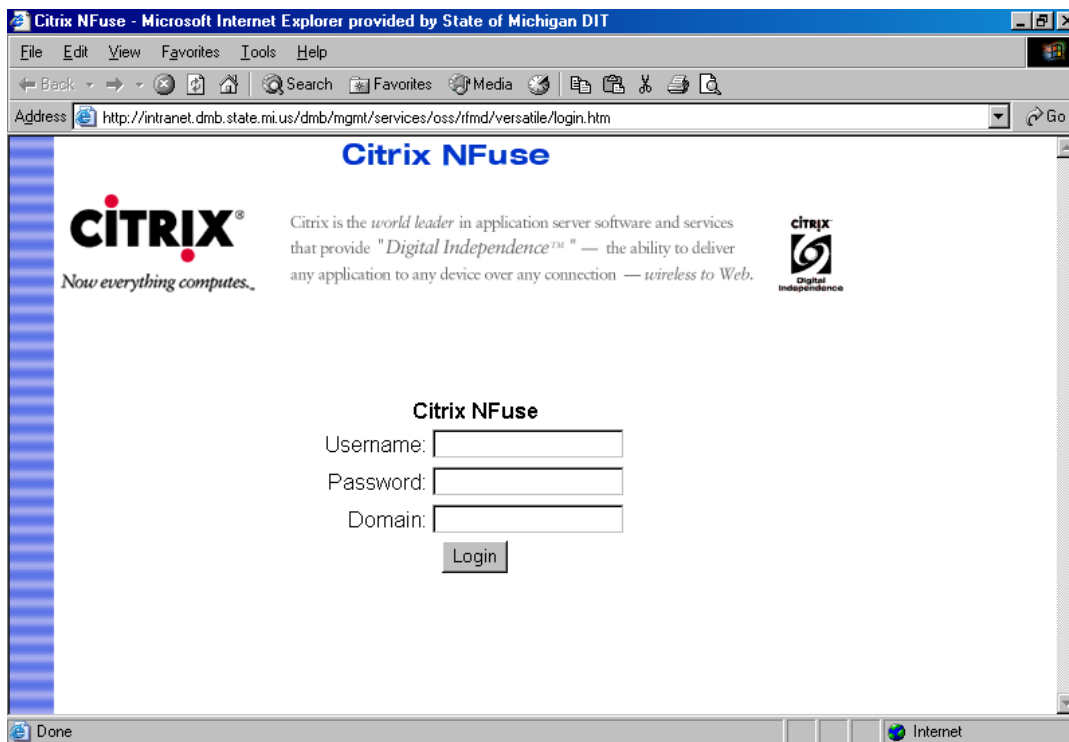


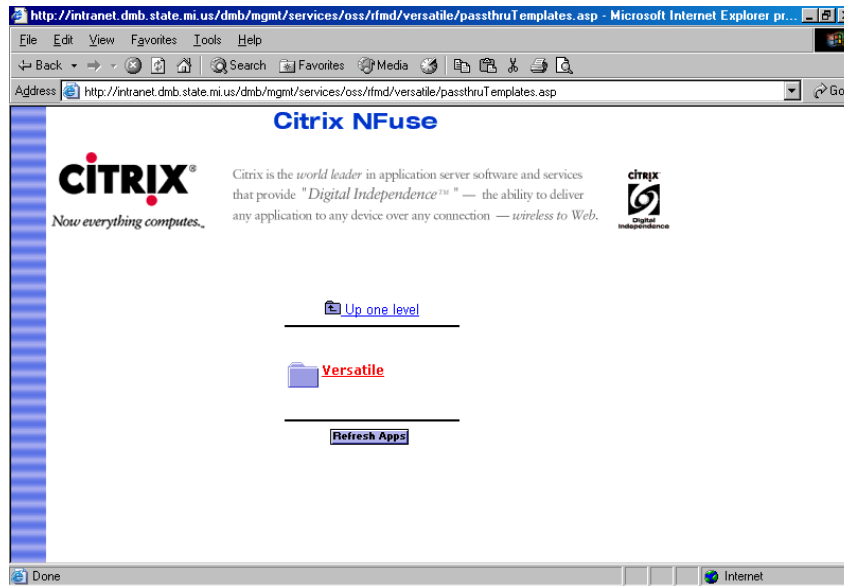
## ACCESSING VERSATILE

The Versatile Enterprise software is accessed through a State of Michigan intranet server using Microsoft Internet Explorer. Citrix software must be loaded on your computer **prior** to accessing Versatile. If you do not have an active Versatile user account, please contact your department's [Records Management Officer](#).

Please follow the steps below to access Versatile.

2. Open Internet Explorer.
3. Enter the following address (we recommend saving this address in your "Favorites"):  
<http://intranet.dmb.state.mi.us/dmb/mgmt/services/oss/rfmd/versatile/login.htm>
4. The Citrix NFuse login screen will open. Enter:
  - a. **Username** (provided by Records Center)
  - b. **Password** (provided by Records Center)
  - c. **Domain** (leave blank)
  - d. Click on the Login button.



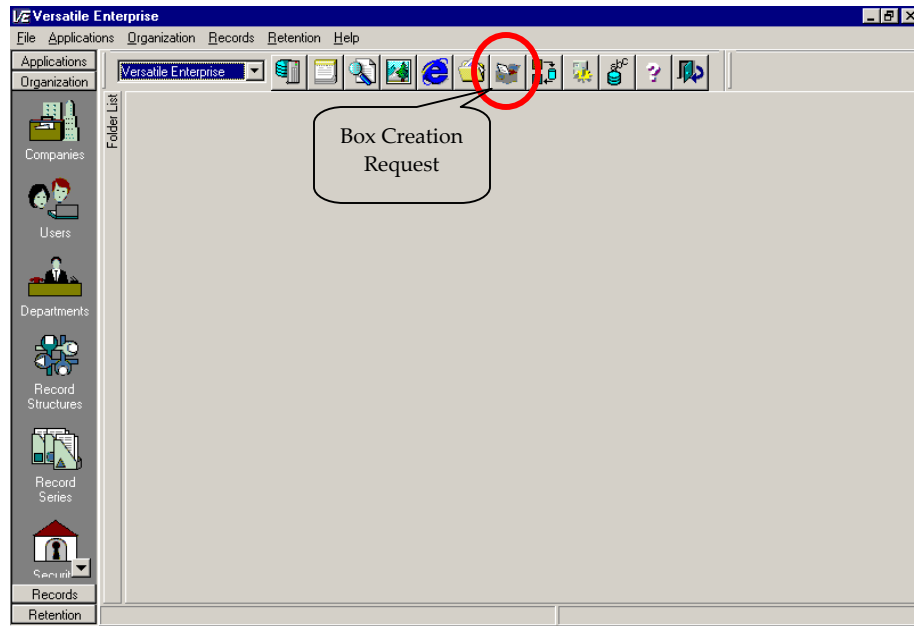


5. Another Citrix screen will open containing a hyper-link to Versatile. Click on the link.
6. Another Citrix screen will open containing a hyper-link to Versatile. Click on the link again. Please wait while Versatile loads on your computer. [If you receive a message indicating that you need to download Citrix, please go to page 7 for instructions.]
7. The Versatile Login Screen will open. Enter:
  - a. **Company** ("STATE OF MICHIGAN RECORDS MANAGEMENT" should already appear, if not, click on the down arrow and select it)
  - b. **User ID** (provided by Records Center)
  - c. **Password** (provided by Records Center)
  - d. Click the OK button.



## BOX DATA ENTRY

**Note:** Do not minimize screens once you begin, Versatile will lock-up.  
**Reminder:** These are uniform procedures for sending records to the State Records Center and the State Archives.



1. Once you login to Versatile the main screen will open. Click on the 7<sup>th</sup> button "Box Creation Request" in the toolbar at the top of the screen. The Box Creation Request Screen will open. This is the screen that you will use to submit information about the contents of each container.

**Box Creation Request**

Request Detail | Request Information

Company: State of Michigan Records Management

User Box Number:  Request Number: 2115407

Department: /55/ISE30/ Forensic Science Division

Record Series: 5304 Worksite Reports (copies)

Series Titles: Worksite Reports (copies)

Description: test

General | Ranges

Type of Box: IBM

Storage Room: INTRANSIT ROOM

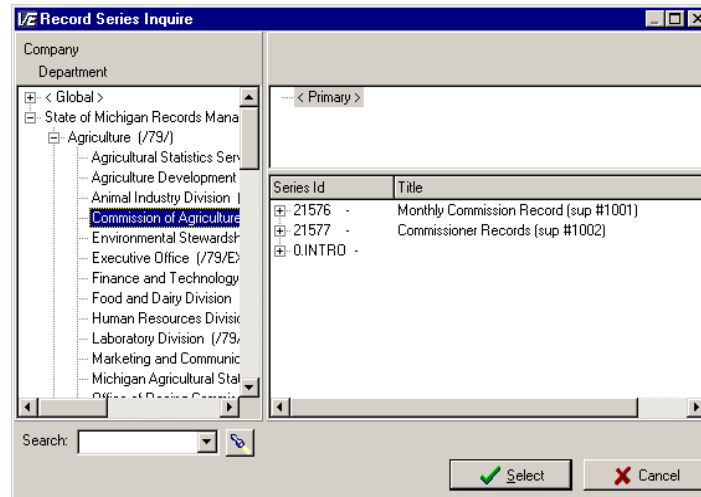
Dates: Event: / / From: 12/31/2004 To: 12/31/2004

Buttons: Help, Browse, New / Clear, Itemize Files, Submit, Close

**Note: The following fields are mandatory!**

- Department
- Record Series
- Dates (From and To)

2. The User Box Number field is optional. You can use it to enter a lot number (not required) and/or a sequential box number.
3. If the contents of the container are listed on an agency-specific schedule, go to the Record Series field. **Click on the button with the 3 dots next to this field. (If you will be using a General Schedule, skip to step #7.)** The Record Series Inquire screen will open.



4. In the left side of this screen, click on the plus sign next to the words “State of Michigan Records Management”. This will provide a list of the Retention and Disposal Schedules that you are authorized to access. Select the schedule you need. A list of records series associated with that schedule will appear on the right side.
5. In the right side of this screen, click on the record series you need. Note: If you click on the gray SeriesID box the list of series will sort numerically. If you click on the gray Title box, the list of series will sort alphabetically.
6. Click on the Select button. Note: when you have finished this step you will return to the Box Creation Request screen, and both the Department and Records Series fields will be populated with the information you selected. (Please skip to step #11.)
7. If the contents of the container are listed on a General Schedule, go to the Record Series field. Click on the button with the 3 dots next to this field. This will open the Record Series Inquire screen.
8. In the left side of this screen click on the plus sign next to the words “State of Michigan Records Management”. The list of records series approved on the various General Schedules will appear on the right side of the screen.
9. Click on the record series you need, and click on the select button. This will return you to the Box Creation request screen, and the information you selected will be populated in the Record Series field.
10. Next, go to the Department field. Type in the alpha-numeric department code that is assigned to the agency transferring the container and **click on the Tab key** to

populate the field with the agency name. Note: this code is printed on the agency's Retention and Disposal Schedule.

11. In the Description field, describe the contents of the container. If you will be itemizing the files in the box, you will receive separate barcode labels for each file. Then you only need to provide summary information in the Description field. However, if you will **not** be itemizing the files, please provide more detailed information. The information that you supply will be the information that people use to retrieve containers, so it should be sufficient to facilitate access.
12. Go to the Storage Room field. Type in the letter "I". The words INTRANSIT ROOM will appear. Note: You can also click on the down arrow, then select the Intransit Room from the list (this is a temporary space that containers are assigned to until they are scanned to the shelves).
13. Go to the Content Dates fields and use the From and To fields to enter the inclusive dates for the contents of the containers.
14. If you will **not** be itemizing the files, you can click on the Submit button. **Note: If you make a mistake, see the instructions on page 19 for correcting mistakes, and for sending comments to the Records Center.**
15. If you will be itemizing files, click on the Itemize Files button (go to page 17 for further instructions). Do **not** click the Submit button until you have finished itemizing all of the files. Note: if you need to submit the box before you have finished itemizing the files, see the instructions on page 20 for sending comments to the Records Center.
16. Versatile will ask you if you want to create another request (submit another container), click on the appropriate response. If you are submitting another container, repeat the instructions above. **Note: You must click the submit button for each box.**



17. **Note:** You must add the phrase "ACCEPT BOX" after you have reviewed your work in the "Add Comment Box" for each box that you submit (see step #4 on page 20 for further details). **Boxes will not be accepted until this phrase appears.**

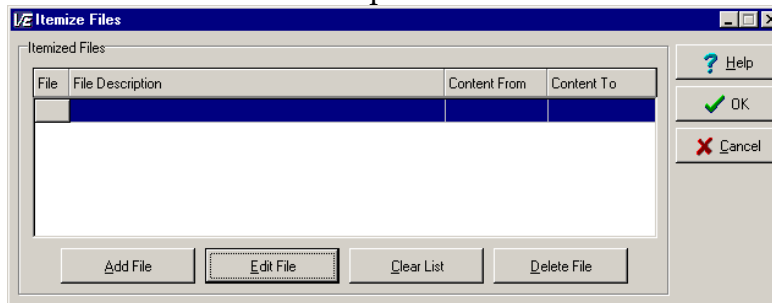


18. HAL staff will receive the information that you submitted, and they will check it for accuracy. You will receive an e-mail message confirming that your barcode labels will be mailed to you (see examples below). Attached to this e-mail will be a Records Transfer Request form that you can e-mail to DMB, Transportation Services ([smithr4@michigan.gov](mailto:smithr4@michigan.gov)) when your boxes are ready to be picked up. Please place the barcode labels on the appropriate containers **before** submitting the Records Transfer Request form.

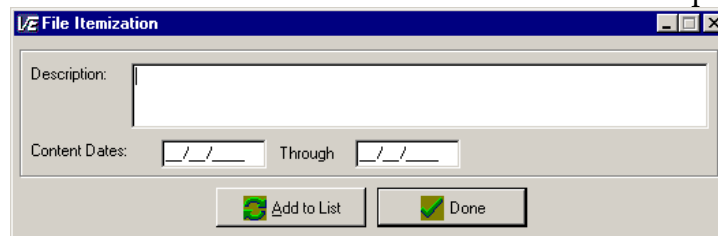


## ITEMIZING FILES

1. Clicking the Itemize Files button will open the Itemize Files screen.



2. Click on the Add File button. The File Itemization screen will open.



3. In the Description field, type in a description of the contents of the file. Note: Even though the field appears to be large, only one line of information will actually print on the label. Please limit your description to 36 characters.
4. In the Content Dates fields, enter the date range for the contents of the file. Note: these fields are optional.
5. Click the Add to List button. If you need to add another file, delete the information that was typed for the first file, and type in the new information. Click the Add to List button again, and repeat this step until all files are itemized.
6. When you have finished adding all of the files, click the Done button. You will return to the Itemize Files screen.
7. If you identify an error with a file that you previously added, you can highlight it and click the Edit File button. This will return you to the File Itemization screen for that file. When you have finished correcting the error(s), click on the Done button.
8. If you want to delete a file that you added, highlight it and click the Delete File button.
9. When you are finished itemizing files, click the OK button. You will return to the Box Creation Request screen. If all data is correct, click on the Submit button.
10. Note: When itemizing files for subsequent boxes, be sure to start with an empty screen. **Click on the Clear List button to remove files that were itemized for other boxes.**
11. HAL staff will receive the information that you submitted, and they will check it for accuracy. You will receive an e-mail message confirming that your barcode labels will be mailed to you (see examples below). Attached to this e-mail will be a

Records Transfer Request form that you can e-mail to DMB, Transportation Services ([smithr4@michigan.gov](mailto:smithr4@michigan.gov)) when your boxes are ready to be picked up. Please place the barcode labels on the appropriate containers **before** submitting the Records Transfer Request form.

01/13/2003 1	/47/PSE10/	
2026	-	00000161
Record No. 216557		

## VIEWING AND CORRECTING DATA ENTRY

You can view the data that you entered about boxes and files **before the submission is accepted** by the Records Center by clicking on the Browse button in the Box Creation Request screen. The Browse Box Creation Requests screen will open.

Request No.	Request Date	Status	User Box No.	From Date	To Date
2115436	02/20/2004 11:51	Requested	TEST	01/01/1960	12/31/1960
test					
2115407	02/13/2004 1:25	Requested	1	12/31/2004	12/31/2004
test					

☒ Automatically display this window when open status items exist  
☐ Display Closed Items

1. If you want to edit a box or file **before it is accepted**, highlight the box in the list and click the Select button at the bottom of the screen. **Note: write down the request number for future reference.** The Box Creation Request screen will open and you can incorporate any changes that are needed.
2. If you do not have time to finish inputting a box, you can submit it and then send a note to the Records Center.

Request Detail      Request Information

Request Number: 2115407      Date of Request: 02/13/2004 1:25:53 PM

Request Status: On Request

Notes/Comments

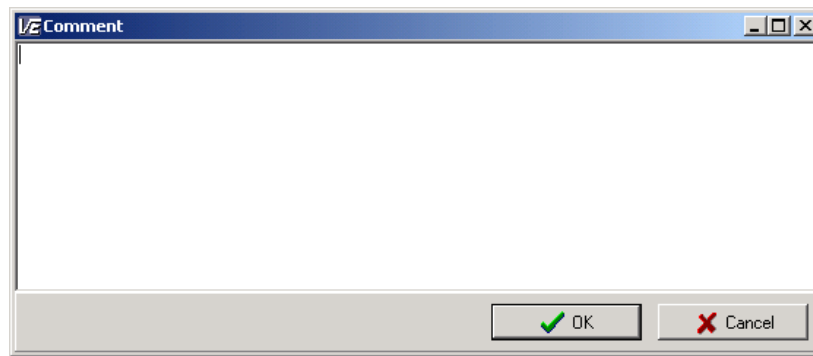
Add Comment

Box Information

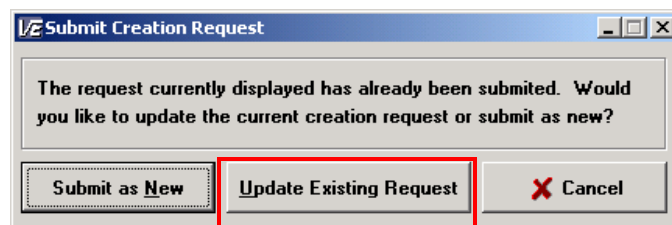
Box Number:      Processed:      More Info

Help  
Browse  
New / Clear  
Itemize Files  
Submit  
Close

3. Click on the Add Comment button. The Comment screen will open.



4. Type in the text of your message, such as "ACCEPT BOX." Click the OK button when you are done. **If you do not want labels sent to you, please use the Comment screen to notify the Records Center.** Note: The Records Center can also add comments to a box. For example, the comment could be about data that the agency forgot to submit about the box. Also note: Once comments are added, they cannot be deleted. If you make a mistake with a comment, add another comment indicating that the previous one can be disregarded.
5. Click the OK button once you are done. The following message will appear, please be sure to click the appropriate box.



6. If errors in the data entry are identified, Jackie Mitchell will enter a note in the comments window indicating what needs to be corrected.

## SHIPPING BOXES

Once information is entered into Versatile, the Records Management Services will print and mail barcode labels to the agency. When the agency receives its barcode labels, they should be placed on the correct boxes. The next step is to submit a Records Transfer Request form to the Department of Management and Budget, Transportation Services (available online). This form notifies DMB where the boxes are located so they can be picked up.

The following instructions will help you complete this form.

1. Enter the department name.
2. Enter the division name.
3. Enter the name of the person who entered the boxes into Versatile.
4. Enter this person's phone number.
5. Enter the location of the boxes that will be picked up (building/floor)
6. Enter the pillar number that is closest to the boxes (may be found on a pillar, wall or cubicle)
7. Enter the name of a contact person, if the person who entered the boxes into Versatile should not be contacted by DMB.
8. Enter the contact person's division name, if it is different than the one provided in item #2.
9. Enter the contact person's phone number, if different than the one provided in item #4.
10. Enter today's date.
11. Enter the barcode numbers that are going to be shipped. If the numbers are sequential, a range can be provided.
12. Enter the total number of boxes that are going to be shipped.
- 13-18. Extra spaces for barcode numbers.
19. Number of boxes with file returns in them. These are several files (more than can fit in an ID mail envelope) that were checked out from the Records Center and are ready to be returned.

The completed form should be e-mailed to Ralph Smith at [smithr4@michigan.gov](mailto:smithr4@michigan.gov).

## PRINTING BOX DETAIL REPORTS

Agencies can print “Box Detail Reports” that will describe the contents of each box, based upon the information that was input into Versatile. Note: Box Detail Reports cannot be printed until the Records Center has accepted the submission.

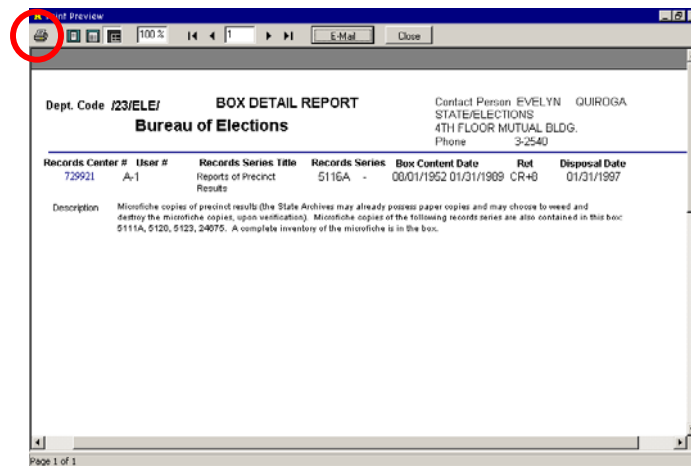
1. In the left toolbar under the Records tab, click on the Items icon. Then click on the Boxes button in the Records Items window. The Box Maintenance screen will open.

The screenshot shows the 'Box Maintenance' window. A callout bubble points to the 'Box Number' field with the text 'Box Reports--Click on Down Arrow'. A red circle highlights the 'Search' button in the right-hand toolbar.

2. In the Box Maintenance screen, click on the Search button in the right toolbar. This will open the Box Search Parameters screen.

The screenshot shows the 'Box Search Parameters' window. A red arrow points to the 'Box Numbers' field.

3. In the Box Numbers field, enter the beginning and ending RC numbers for the range of boxes. If you only want to print a report for one box, enter the same number in both fields. Then click the "OK" button. You will return to the Box Maintenance screen, and data about the first box will appear in the various fields.
4. The third button from the left side of the toolbar at the top of the screen is called "Box Reports" (looks like several sheets of paper). Click on the down arrow next to this button (do not click on the button itself). Several options will appear below the arrow when you click on it. If you want to print a report on the boxes only (no itemized file information), select "Box Detail Report for Boxes Only." If you want to print a report on boxes and itemized files, select "Box Detail Report for Itemized Files 1."
5. Versatile will load your query and a Print Preview screen will open (this may take a few moments or minutes). To print this report, click on the printer icon. The Print screen will open. Click the "OK" button, and the report will print.



6. If you cannot print, contact the DIT Service Center for assistance. You can call them at (517) 241-9700 or e-mail them at [ditservice@michigan.gov](mailto:ditservice@michigan.gov). Please indicate that the "DIT DPO Server Services Team 5" should be contacted to resolve the problem.



## SEARCHING FOR AND RETRIEVING FILES AND BOXES

The instructions in this section for retrieving boxes from the State Records Center are provided for agencies that can access Versatile. Agencies that cannot access Versatile, can submit a Records Referral Order form (available online at <http://www.michigan.gov/recordsmanagement/>), can send an e-mail to [RecordsCenter@michigan.gov](mailto:RecordsCenter@michigan.gov), or can call the Records Center at (517) 335-9132.

State agencies and members of the public that want to access records at the State Archives of Michigan should call (517) 373-1408 for assistance.

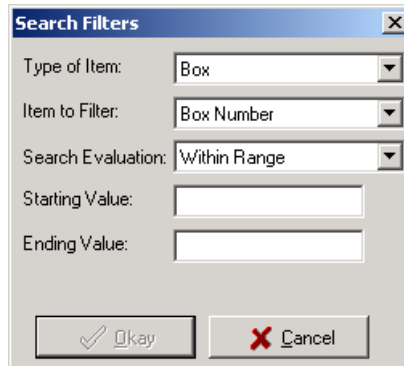
1. Click on the 3<sup>rd</sup> button (looks like a magnifying glass and paper) in the toolbar at the top of the main Versatile screen. The Search screen will open.

The screenshot shows the 'Search' window with the following components:

- Databases:** A list with 'Versatile Enterprise' selected.
- Companies / Departments:** A list with 'State of Michigan Records Ma' (partially visible).
- Search Strategy:** A dropdown menu for 'Strategy' and a 'Save' button.
- Filters:** A 'Keywords' input field with an 'Add' button.
- Search Filters:** A large empty rectangular area for additional filters.
- Information to Search:** A list of checkboxes: 'Active Files' (checked), 'Inactive Files' (checked), 'Boxes' (unchecked), 'Citations' (unchecked), 'Record Series' (unchecked), and 'Documents' (unchecked).
- Buttons:** 'Add Department', 'Add', 'Edit', 'Remove', 'Clear All', 'Help' (with a question mark icon), and 'Search'.
- Checkboxes:** A checked checkbox for 'Display by Department Id' at the bottom left.

2. The column on the right side of the screen is used to specify the type of container you are looking for, files or boxes. If you are looking for files, only check the space next to the words, Active Files and Inactive Files. If you are looking for boxes, only check the space next to the word Boxes. If you are looking for boxes and files, check the space next to all three.
3. There are multiple types of filter criteria you can use to perform your search. Once you have entered all of the relevant filtering criteria, click the Search button (at the bottom of the right side of the screen) to perform the search. If your first try does not yield results, try again, or call Jackie Mitchell at (517) 335-9132 for help. Examples of some, but not all, filter criteria are listed below.

- a. If you know that a particular word or phrase was typed into the description field when the container was submitted, you can perform a Keyword search. Simply type that word or phrase in **quotation marks** in the Filters Keywords field, then click the Add button next to this field.
- b. Other filtering criteria are selected by clicking the Add button at the bottom of the screen. This will open the Search Filters screen.



- c. In the Type of Item field, click on the down arrow to identify if you are searching for a box or a file.
  - d. In the Item to Filter field, click on the down arrow and choose from the list of options. For example, if you want to search for a container based upon the date (or date range) that it was submitted for storage, select Creation Date. If you want to search for a box by barcode number, select Box Number. If you want to search for a file by barcode number, select Record Number. If you want to search by record series, select Record Series. If you want to search by Lot number, select User Number. Depending upon which of the above options you select, Versatile may ask for additional information, such as a barcode number or a date range. You must supply this information before clicking the Okay button.
  - e. Remember: Records Center Number = Box Number, User Box Number = Lot/Box Number, all lot and box numbers entered by the Records Center contain 4-digits (0000-0000).
4. When you finish entering the filtering criteria and click the Search button a Search Result List will load and open. Boxes will have a box icon next to them in this list, and files will have a file icon.

**Keyword Search Results**

Inquire Send Request Reports Data Streams Help Exit

Department	Item Id	User Box Number	Box Number
/25/RFM/	00705705	BATCH	70570
/25/RFM/	00592065	2463-0002	59206
/25/RFM/	00642729	2463-0005	64272
/25/RFM/	24474 -00000345	2398-0011	55946
/25/RFM/	24474 -00000344	2398-0011	55946
/25/RFM/	24474 -00000343	2398-0011	55946

Entry 1 of 479

5. If a container is highlighted in red or yellow, it has been checked-out by someone else already and cannot be checked out at this time.
6. Call Jackie (335-9132) to set up your headings to indicate whether a box is destroyed.
7. If you want to view detailed information about a container (such as who checked it out), double-click on the file or box icon. A File or Box Maintenance screen will open. To close this screen, click on the door icon in the top toolbar (you will return to the Search Result List).

**Box Maintenance**

Main User Defined Extended Description Files

Company: State of Michigan Recon State: Inactive

Box Identifiers

Box Number: 592066 User Box Number: 2463-0003 Record Center ID: Barcode ID: 592066

Location

Box Type: REGULAR - LETTER/LEGAL Record Center: None Aisle - Bay - Shelf: Position: Alternate Location: Space Management

Descriptive Information

Department: /25/RFM/ Records Management Services Record Series: 24474 Records Disposal Notice Description: DISPOSAL NOTICE - ARCHIVES - 12-31-99 - PER DESTRUCTION DETAIL REPORT

Primary Information Additional Retention Destruction Activity Ranges

Last Name	First Name	Service Req	Check-Out Date	Date Returned	Status
		31764		06/19/2000 3:50:58 AM	Returned
		32618		07/27/2000 12:48:10 PM	Returned
		35810		12/21/2000 1:53:54 PM	Returned
BECKER	MARILYN	37129		02/21/2001 7:15:23 AM	Returned
		40611	07/09/2001 3:34:23 PM		Checked Ou

Search Update Delete Add Clear Previous Next Itemize Files Print Label Options

8. The Activity tab in the row at the middle of the screen contains check-out information.
9. If you want to retrieve a box or file from the State Records Center that is listed in the Search Result List, click on the green box for that container. Click on the Send Request button in the toolbar at the top of the screen. The Send Request Screen will open.

**Send Request**

Company: State of Michigan Records Management

Recipient User: 07MITCHELL MITCHELL, JACKIE

Notes:

Send Request Cancel

10. Your name will appear in the Recipient User field. If you want the container sent to someone else, click the button with the 3 dots next to this field. The User Inquiry screen will open.

**User Inquiry**

Company: State of Michigan Recc. Default

Last Name	First Name	User Id
ABBRUZZESE	DEBBY	27ABBRUZ
ABRIGO	MARIA	39ABRIGO
ACHLEY	MELANIE	63ACHLEY
ADADO	ALICE	75ADADOA
ADAMS	JANICE	80ADAMS
ADAMS	JANICE	76ADAMS
ADAMS	SANDY	63ADAMS
ADATSI	FELIX	55ADATSI

Search: mitchell

Select Cancel

11. In the Search field type the last name of the intended recipient, and click the flashlight button. If necessary, you can scroll down the list to find the person. Once you find the person, highlight the name and click the Select button (you will return to the Send Request screen, and the name will be populated in the field). If the person you are looking for is not on the list, call (517) 335-9132, to have the person added.
12. Please use the Notes field to provide special instructions. **For example, indicate if the container is needed to respond to a FOIA request, if it is needed immediately**

**for some other reason, if someone from your agency will be visiting the State Records Center to inspect or pick-up the box (and when they will arrive), etc.**

13. Click the Send Request button. The boxes will turn red if you have ordered them correctly. The containers will be retrieved according to your instructions. Note: The State Records Center needs at least one hour to process a retrieval request. If the request is for a lot of containers, additional time may be needed to retrieve everything.

**Note: If the containers have been transferred to the State Archives, do NOT use Versatile to submit a request to retrieve them. Please contact the State Archives via phone at (517) 373-1408, or via e-mail at [archives@michigan.gov](mailto:archives@michigan.gov), for assistance with accessing the containers.**

## RECORDS CENTER DISPOSAL

Twice a year the Records Center queries Versatile to identify boxes that have fulfilled their retention requirements, and are eligible for **destruction**. Once a year the Records Center queries Versatile to identify boxes that have fulfilled their retention requirements, and are eligible for **transfer** to the State Archives of Michigan for permanent preservation.

Disposal notices are generated as a result of the queries. The notices are sent to each department's RMO for review and approval, prior to removing the boxes from the Records Center. RMOs generally distribute the disposal notices to their contacts in each agency. Agencies are allowed to spend 30 days reviewing their disposal notices and must return the approved notices to their RMO. Questions about disposal notices should be directed to Marcia Lyon at (517) 335-9147 or [lyonm@michigan.gov](mailto:lyonm@michigan.gov).

Some public records contain sensitive or confidential information. These records should not be placed in a regular trash or recycle bin when they are destroyed. It is important that government agencies ensure that these records are destroyed in a manner that prevents the inappropriate release of the information. The State of Michigan administers a master contract with a vendor that complies with the state's requirements for confidential destruction of records. Since the State Records Center stores some confidential records, the Records Center uses this contractual service to destroy all records. Government agencies that are interested in using this contract to destroy confidential records in their office should contact the vendor:

### **Certified Document Destruction**

**Attention: Brian Dorosz**

**1-800-433-7876**

## FREQUENTLY ASKED QUESTIONS

- Q:** How do I know if my records are authorized for temporary storage at the Records Center?
- A:** Look at your Retention and Disposal Schedule (specific or general). If the period of time listed in the Agency Retention column is different than the period of time listed in the Total Retention column, then storage at the Records Center is authorized. The difference between the two periods of time is the amount of time that storage is authorized for.
- Q:** How do I know if my records are authorized for transfer to the State Archives for permanent preservation?
- A:** Look at your Retention and Disposal Schedule (specific or general). On the right side of the page the words "Transfer to State Archives" will appear if the records are authorized.
- Q:** What should I do if I have records that are not listed on a Retention and Disposal Schedule (specific or general)?
- A:** Records cannot be destroyed, nor can they be transferred to the Records Center or the State Archives if they are not listed on a schedule. Contact your department's Records Management Officer, and request to have the records series added to your schedule.
- Q:** What is the "Description" field for?
- A:** This field is used to describe the contents of a container. It may be a summary description (especially if each file will be itemized separately), or it may be very detailed (especially if you are sending materials to the State Archives).
- Q:** When should I itemize the files stored in a container?
- A:** The contents of a box can be described in two ways. If your agency tends to retrieve individual files from a container, rather than the entire box, and needs to receive barcode labels for each file. It is recommended that you itemize the files. However, if your agency tends to retrieve entire boxes, or if the container will be sent to the State Archives, it is not necessary to itemize the files; rather a detailed description in the "Description" field is encouraged. Also, it is not necessary to itemize files if there is only one file in a container.
- Q:** Do I need a Lot number?
- A:** No. The Records Center no longer requires a lot number, and the State Archives never used lot numbers.

- Q:** How can I keep track of the containers I am entering if I do not use a lot number?
- A:** You can enter a sequential box number in the User Box Number field, beginning with the number 1 for each new shipment.
- Q:** Do I still need to submit a transmittal form?
- A:** No. The transmittal form will be obsolete once people are trained to directly enter information into Versatile.
- Q:** Do I still need to maintain a list of what is in each box?
- A:** No. Versatile retains all of the information that you input. You will receive a Box Detail Report after the data is entered, and the Records Management Services can always produce a new copy of this report for you if you need another copy.
- Q:** Can I itemize files in boxes that I previously sent to the Records Center?
- A:** Yes. Please call 335-9132 to make arrangements for inputting files from older boxes.
- Q:** What is my department code?
- A:** Each agency has been assigned a unique alpha-numeric code. This code can be located on the top left-hand corner of both your Box Detail Report, on your Retention and Disposal Schedule, and by clicking in the record series field of the Box Detail screen. (Example: 25/RMS)
- Q:** What is the records series number?
- A:** This is the code that is listed on your Retention and Disposal Schedule to identify each records series. Each container in Versatile must be linked to a records series to identify its approved retention period. Each container can only contain one records series.
- Q:** Why does the department code not appear when I use a records series number from a General Schedule?
- A:** All departments can use the general schedules, so you must key in your own department code and hit the tab key.
- Q:** Why does the series title not appear when I use records series numbers from a General Schedule?
- A:** The series title will automatically generate later, and it will appear on the Box Detail Report.



Q: What does “intransit” mean?

A: Boxes that have been input into Versatile, but have not been physically received by the Records Center or the State Archives are identified as “intransit.”

Q: What are the “content dates”?

A: Please use this field to input the beginning and ending dates for the contents of each file or box.

Q: Should I prepare a list of the contents of each box and file before I input into Versatile, or should I input directly from the box?

A: Inputting information directly from the box will be faster and easier, if it is practical to put the box near your computer during the data entry process.

Q: Do I have access to all boxes at the Records Center?

A: No. Just those boxes assigned to your department code.

Q: Do I have access to all boxes at the State Archives?

A: Yes. Unless they are legally confidential. There are procedures available to provide authorized individuals with access to confidential records. Records preserved by the State Archives cannot be physically removed from our facility. However, they are accessible via on-site visit, e-mail, phone and fax. Note: Versatile will only allow you to search for containers that your agency sent to the State Archives. If you want to search for containers that other agencies sent to the State Archives, please call (517) 373-1408 or e-mail [archives@michigan.gov](mailto:archives@michigan.gov).

Q: Can I fix mistakes before I submit a container?

A: Yes. Just edit the information on the screen.

Q: Can I fix mistakes after I submit a container?

A: Yes. Please send an e-mail message to Jackie Mitchell at [mitchellj1@michigan.gov](mailto:mitchellj1@michigan.gov) and she will correct the mistake for you. (It takes 3 to 4 weeks to input corrections).